

INVEST IN RELATIONSHIPS.

Get to know our clients, industry partners, and your coworkers on a personal level. Seek to understand what's important to others and find out what you can do to have an impact on them and their families. Be bold and build strong, meaningful, and lasting connections through warmth, creativity, and sensitivity. Relationships built the foundation our business and our future will be determined by the value we deliver to others.

When I first started 34 years ago, I would say to new prospects, "You will hear from me six times per year: four newsletters, an annual review, and a birthday card." One prospect responded, "Six times a year, I don't even hear from my mother that often!"

As most have heard, we set up our firm as an "antidote" to the typical insurance agent who sells vanishing premium plans that have reappearing premiums that then lead to the "vanishing agent."

We do a lot to build and grow relationships with our clients. For years we sent out scratch off lottery cards for every client's birthday. Clients loved them and in fact, it worked so well we stopped doing it!

But there are many things we do and we do them well. For example, we use our version of the "Mackay 66," we send gifts twice per year to a long list, we do annual review letters, meetings and calls, Bob sends Tidbits, and runs the CAN events. We are committed to respond quickly to all client inquires. All these things and more all designed to enhance and grow relationships. We do a lot but we are always looking to do more.

What else can we do to grow and invest in relationships?

